

Getting Started

Start here to activate your administrator account, log in, and complete the initial setup steps before using DynaTrail Dispatch.

- [Start Here – New Account Setup](#)
- [Company Information Setup](#)
- [Carrier Confirmation Defaults](#)
- [Billing Defaults](#)
- [Driver Settlement Defaults \(Carriers Only\)](#)
- [QuickBooks Integration](#)
- [Subscription Information](#)
- [Adding Your First Users](#)
- [User Profile Settings](#)

Start Here - New Account Setup

?? ADMINISTRATOR SETUP GUIDE

Your browser does not support the video tag.

Welcome to DynaTrail Dispatch

Before your team begins using DynaTrail Dispatch, the system administrator must complete several initial configuration steps. This guide walks you through the required setup process to prepare your account for daily operations.

Follow the steps below in order.

IN THIS GUIDE

?Step 1: Activate account

??Step 2: Log in

??Step 3: View Company Profile

Step 1 — Activate Your Administrator Account

When your company account is created by a DynaTrail employee, the system automatically sends an activation email to your designated administrator.

The email will contain a secure link allowing you to create your password.

□ REQUIRED ACTIONS

1. Open the activation email from **DynaTrail Dispatch**
2. Click the **Create Password** link
3. Enter your new password
4. Confirm your password

??

What happens next: Once completed, you will be redirected to the DynaTrail login page.

Step 2 — Log Into The System

After creating your password:

1. Go to the DynaTrail login page
2. Enter your **administrator email address**
3. Enter the **password you just created**
4. Click **Login**

?

Expected result: After logging in, you will see the main system dashboard.

Step 3 — Open Company Profile Settings

The next step is to configure your company settings.

1. Click **Settings**
2. Select **Company Profile**

The Company Profile section contains several tabs where you will configure important system defaults.

Company Information Setup

?? ADMINISTRATOR SETUP GUIDE

Your browser does not support the video tag.

Before using DynaTrail Dispatch for daily operations, administrators must complete their company profile information.

The Company Information tab contains the core details used throughout the system for invoices, confirmations, and other communications.

IN THIS GUIDE

?? Opening Company Profile Settings

? Company Information Tab

?? Business Contact Email

? Company Website

? Business Number

?? Uploading Your Company Logo

? Saving Your Company Information

Opening Company Profile Settings

To access the Company Profile section:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**

This will open the Company Profile settings page where several configuration tabs are available.

Company Information Tab

The **Company Information** tab allows administrators to enter the basic details of their organization.

This information will appear throughout the system and on documents generated by DynaTrail Dispatch.

Administrators should complete the following fields.

Business Contact Email

This email address represents the primary contact for the company.

It may be displayed on documents when sending system notifications, invoices, and other communications.

? Tip

Example email: **dispatch@yourcompany.com**

Company Website

Enter the website address for your company.

This may appear on invoices and customer communications generated by the system.

? Tip

Example website: **www.yourcompany.com**

Business Number

Enter your registered business number or tax identification number.

This information may appear on invoices and other official documents.

? Tip

Examples may include:

Canadian Business Number (BN)

U.S. EIN

Uploading Your Company Logo

Your company logo can be uploaded within the Company Information section.

Once uploaded, the logo will automatically appear on:

- Carrier confirmations
- Customer invoices
- Other system-generated documents

To upload your logo:

1. Click **Upload Logo**
2. Select your company logo file
3. Click **Save Changes**

? Tip

A high-resolution PNG logo with a transparent background produces the best results on invoices and confirmations.

Saving Your Company Information

After entering your company details:

1. Review the information for accuracy
2. Click **Update**

Your company information will now be used throughout the DynaTrail Dispatch system.

Carrier Confirmation Defaults

?? ADMINISTRATOR SETUP GUIDE

Your browser does not support the video tag.

Carrier confirmations are automatically generated by DynaTrail Dispatch when a load is dispatched to a carrier.

The **Carrier Confirmation Defaults** tab allows administrators to configure the email address and default message that will be used when sending carrier confirmations.

These settings ensure confirmations are sent with consistent messaging and proper contact information.

IN THIS GUIDE

? Opening Carrier Confirmation Defaults

?? Carrier Confirmation Email Address

? Default Carrier Confirmation Email Message

? Carrier Confirmation Footer Notes

? Saving Carrier Confirmation Settings

Opening Carrier Confirmation Defaults

To configure your carrier confirmation settings:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**

3. Click the **Carrier Confirmation Defaults** tab

This section controls how carrier confirmations are sent from your system.

Carrier Confirmation Email Address

This email address will appear as the sender when carrier confirmations are sent from DynaTrail Dispatch.

Carriers will use this email as the contact for confirmation-related communication.

? Tip

Example email: **dispatch@yourcompany.com**

Default Carrier Confirmation Email Message

This message will automatically appear in the email body when carrier confirmations are sent.

You can use this section to include a standard message that will accompany every confirmation.

Many companies use this space to provide instructions to carriers or important dispatch notes.

? Tip

Example message:

Please review the attached carrier confirmation and contact dispatch immediately if any details are incorrect.

Carrier Confirmation Footer Notes

Footer notes allow you to add additional information that will appear at the bottom of every carrier confirmation document.

This section is commonly used for:

- Terms and conditions
- Payment terms
- Required documentation instructions
- Contact information for dispatch

? Tip

Example footer:

Payment terms are Net 30 from receipt of invoice and POD. Carrier must submit all paperwork within 48 hours of delivery.

Saving Carrier Confirmation Settings

After configuring your confirmation settings:

1. Review your email address and message content
2. Click **Update**

All future carrier confirmations will now use these default settings.

Billing Defaults

?? ADMINISTRATOR SETUP GUIDE

Your browser does not support the video tag.

The **Billing Defaults** tab allows administrators to configure how invoices and billing communications are handled within DynaTrail Dispatch.

These settings control the default email addresses, invoice messages, fuel surcharge configuration, and numbering used when billing trips.

Configuring these defaults ensures invoices and billing communications are sent with consistent formatting and company information.

IN THIS GUIDE

? Opening Billing Defaults

?? Billing Email Address

? Send Copies to Billing Email

? Block Trips From Being Billed

? Fuel Surcharge (FSC)

? Default Billing Currency

? Starting Trip Number

? POD Email Default Message

? Invoice Email Default Message

? Invoice Notes

? Saving Billing Defaults

Opening Billing Defaults

To access the Billing Defaults section:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **Billing Defaults** tab

This section contains several configuration options that affect how invoices and billing communications are generated.

Billing Email Address

This email address will appear as the sender when invoices and billing communications are sent from the system.

Customers receiving invoices will see this email as the contact for billing questions.

? Tip

Example email: **billing@yourcompany.com**

Send Copies to Billing Email

Administrators can choose whether a copy of each invoice email should also be sent to the billing email address.

This is commonly used to keep an internal record of invoices that were delivered to customers.

? Tip

Many companies enable this option so their accounting team automatically receives a copy of every invoice sent.

Block Trips From Being Billed

This option allows administrators to configure whether new trips are **blocked from billing** by default.

When enabled, trips must be manually approved before invoices can be generated.

This setting is useful for companies that require an accounting review before invoices are sent.

? Tip

Some companies use this setting to ensure paperwork such as PODs has been received before invoicing.

Fuel Surcharge (FSC)

DynaTrail Dispatch allows companies to automatically apply a fuel surcharge to invoices.

If your company uses fuel surcharge billing, this section allows you to configure the rate.

? Tip

Example FSC rate: **12% fuel surcharge**

Default Billing Currency

This setting determines the currency used when generating invoices.

All invoices will default to the selected currency unless manually changed on a specific trip.

? Tip

Common options include: **USD or CAD**

Starting Trip Number

Administrators can define the starting trip number used by the system.

This allows companies transitioning from another dispatch system to continue their existing trip numbering sequence.

? Tip

Example starting trip number: **10500**

POD Email Default Message

This message will appear in the email when sending Proof of Delivery (POD) documents to customers.

You can use this space to provide a standard message when delivering completed shipment documentation.

? Tip

Example message:

Please find the attached Proof of Delivery for your records.

Invoice Email Default Message

This message will appear in the email when invoices are sent to customers.

It allows companies to include a standard billing message with every invoice.

? Tip

Example message:

Please find the attached invoice for the completed shipment. Thank you for your business.

Invoice Notes

Invoice notes appear directly on the invoice document itself.

Companies often use this section to include payment terms or other important billing information.

? Tip

Example invoice note:

Payment terms are Net 30 days from invoice date.

Saving Billing Defaults

After configuring your billing settings:

1. Review the information for accuracy
2. Click **Update**

All future invoices and billing communications will now use these default settings.

Driver Settlement Defaults (Carriers Only)

?? ADMINISTRATOR SETUP GUIDE

Your browser does not support the video tag.

The **Driver Settlement Defaults** tab allows carrier companies to configure how driver settlements and payroll calculations are handled within DynaTrail Dispatch.

These settings define the default currency used for settlements, the payroll cutoff period, and how exchange rates are applied when converting between currencies.

?? Note

This section is only used by carrier accounts. Broker-only accounts will not see this tab.

IN THIS GUIDE

?? Opening Driver Settlement Defaults

? Driver Settlement Currency

? Payroll Cutoff Date

? Exchange Rate Handling

? Saving Driver Settlement Settings

Opening Driver Settlement Defaults

To access the Driver Settlement Defaults section:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **Driver Settlement Defaults** tab

This section contains configuration options used when calculating driver settlements and payroll.

Driver Settlement Currency

This setting determines the default currency used when calculating driver settlements.

All settlement calculations will use this currency.

? Tip

Example settlement currency: **USD or CAD**

Payroll Cutoff Date

The payroll cutoff date determines which trips are included in the current payroll period.

Trips completed before the cutoff date will be included in the current settlement cycle.

Trips completed after the cutoff date will be included in the next payroll cycle.

? Tip

Many companies set the cutoff date to match their monthly payroll schedule.

Exchange Rate Handling

If your company operates across multiple currencies, DynaTrail Dispatch allows you to control how exchange rates are applied when calculating driver settlements.

Administrators can choose to allow the system to automatically apply exchange rates or manually set a specific rate.

Automatic Exchange Rate

When automatic exchange rates are enabled, the system will automatically apply the current exchange rate when converting between currencies.

It will use the current exchange rate based on the date of the item being converted.

? Tip

Automatic exchange rates are recommended for companies that regularly operate across USD and CAD transactions.

Manual Exchange Rate

If manual exchange rates are used, administrators can specify a fixed exchange rate when calculating settlements.

This allows companies to use their own internal exchange rate policies.

? Tip

Some companies use a fixed exchange rate for accounting consistency across settlement periods.

Saving Driver Settlement Settings

After configuring your settlement settings:

1. Review the configuration options
2. Click **Update**

All driver settlements will now use these default settings.

QuickBooks Integration

?? ADMINISTRATOR SETUP GUIDE

DynaTrail Dispatch allows companies to integrate their system with **QuickBooks Online** to simplify accounting and reduce manual data entry.

Once connected, invoices and financial transactions generated in DynaTrail can automatically be recorded in your QuickBooks account.

This integration helps ensure your accounting records remain accurate and synchronized with your dispatch operations.

IN THIS GUIDE

?? Opening QuickBooks Integration Settings

? Connecting to QuickBooks

? Products and Services Setup

?? Mapping Products and Services

? Carrier Accounts – Driver Settlement Items

? Saving QuickBooks Integration Settings

Opening QuickBooks Integration Settings

To access the QuickBooks integration settings:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**

3. Click the **QuickBooks Defaults** tab

This section allows administrators to connect their QuickBooks account and configure how financial data will be posted.

Connecting to QuickBooks

To enable QuickBooks integration:

1. Click **Connect to QuickBooks**
2. Log into your **QuickBooks Online** account
3. Authorize DynaTrail Dispatch to access your QuickBooks data

Once connected, DynaTrail will be able to create invoices inside QuickBooks using the products and services you configure.

? Tip

You must have **administrator access in QuickBooks Online** to authorize the integration.

Products and Services Setup

DynaTrail Dispatch posts invoice line items to **QuickBooks Products and Services**.

Each billing category in DynaTrail should be mapped to a corresponding **Product or Service** item in QuickBooks.

These items determine how revenue is categorized in your accounting reports.

? Tip

In QuickBooks Online, products and services are used on invoices and are linked to accounts for reporting.

If you have not yet created the required products and services in QuickBooks, follow the official QuickBooks setup guide below.

QuickBooks Setup Guide:

[How to set up Products and Services in QuickBooks Online](#)

Mapping Products and Services

Once your QuickBooks products and services are created, you can configure DynaTrail to use them when generating invoices.

Common examples include:

- Freight Charges
- Fuel Surcharge (FSC)
- Detention
- Layover
- Accessorial Charges
- Customs or Brokerage Fees

? Tip

Creating clear product and service names in QuickBooks will make your financial reporting much easier.

Carrier Accounts - Driver Settlement Items

Carrier companies may also configure products or services used when recording driver-related transactions.

This ensures driver settlements and additional charge types are properly categorized inside QuickBooks.

? Tip

Proper product and service mapping helps maintain clean financial records and simplifies accounting reconciliation.

Saving QuickBooks Integration Settings

After completing the QuickBooks configuration:

1. Verify that the QuickBooks connection is active
2. Confirm the correct products and services are configured
3. Click **Update**

DynaTrail Dispatch will now be able to synchronize invoices and billing transactions with your QuickBooks account.

Subscription Information

?? ADMINISTRATOR SETUP GUIDE

Once your company is ready to activate billing, you can select the subscription plan that matches your company's size.

DynaTrail Dispatch offers flexible plans based on the number of trucks or licenses required for your operation.

IN THIS GUIDE

? **Selecting a Subscription Plan**

? **Completing Your Subscription Payment**

? **After Subscribing**

? **Trial Period Reminder**

Selecting a Subscription Plan

To choose a plan:

1. Open **Settings**
2. Select **Company Profile**
3. Click the **Subscription Information** tab

In this section, you will see a list of available subscription plans.

Each plan includes:

- The number of trucks or licenses included
- The monthly subscription price
- The plan description

When you find the plan that matches your company size, click **Purchase Subscription**.

Completing Your Subscription Payment

After clicking **Purchase Subscription**, a secure checkout window will open.

This payment window is powered by **Stripe**, a trusted global payment provider.

Inside the checkout window, you will enter:

- Email address
- Credit card number
- Expiration date
- CVC security code
- Billing country and postal code

Once the payment information is entered, click **Subscribe**.

? Tip

Stripe securely processes your payment and does not store your credit card information inside DynaTrail.

After Subscribing

Once your payment is successfully processed:

1. Stripe will confirm your subscription
2. You will automatically be returned to the **Subscription Information** page inside DynaTrail
3. Your selected subscription plan will now be active

Your system will now be fully unlocked and ready for daily operations.

Trial Period Reminder

New accounts begin with a **30-day trial period**.

You may subscribe at any time during the trial.

If no subscription is selected before the trial ends, system access may be deactivated until a plan is activated.

Adding Your First Users

?? ADMINISTRATOR SETUP GUIDE

After completing your company setup and activating your subscription, the next step is to add the members of your team to the system.

Each person who will be working inside DynaTrail Dispatch should have **their own user account**.

DynaTrail is designed so that **only one computer can be logged into a user account at a time**. This prevents multiple people from working from the same login simultaneously.

Creating individual user accounts ensures that each team member has their own access to the system and can work independently.

Individual user accounts also allow each employee to maintain their own:

- User profile information
- Customizable email signature used when sending confirmations and communications
- Activity history within the system

For these reasons, we strongly recommend creating a separate login for every employee who will use the system.

IN THIS GUIDE

? Opening the Users Page

? Creating a New User

? Password Setup Email

?? Assigning User Permissions

? Creating Additional Users

Opening the Users Page

To begin adding your team members:

1. Click **Settings** in the left navigation menu
2. Select **Users**

This will open the **User Management** screen.

The screen is divided into two main sections:

- **User List** on the left side
- **User Creation Panel** on the right side

The user creation panel is where new accounts are added.

Creating a New User

To create a new user account:

1. Enter the user's **First Name**
2. Enter the user's **Last Name**
3. Enter the user's **Email Address**

The email address entered here will be used for the user's system login.

After entering the information, click **Create**.

Password Setup Email

Once a new user is created, the system will automatically send a **password setup email** to the email address entered for that user.

The user will need to:

1. Open the email from **DynaTrail Dispatch**
2. Click the **Create Password** link
3. Enter their new password
4. Confirm the password

After completing this process, the user will be able to log into the system using their email address and newly created password.

? Tip

If the user does not see the password setup email, ask them to check their **spam or junk folder**.

Assigning User Permissions

Below the user information fields you will see the **permissions table**.

This section controls what parts of the system the user can access.

Each module includes the following permission options:

| Permission | Description |
|---------------|------------------------------------|
| View | Allows the user to see information |
| Create | Allows the user to create records |
| Edit | Allows the user to modify records |
| Delete | Allows the user to remove records |
| Full | Grants full access to the module |

Administrators should only enable the permissions required for the user's role.

For example:

- Dispatchers typically need access to **Dispatch Boards** and **Order Entry**
- Accounting staff typically require access to **Billing** and **Reports**

Creating Additional Users

Repeat the same process to add additional team members.

Each employee should have their own **login credentials** so they can work independently inside the system.

Providing separate accounts ensures:

- Only one workstation is logged into a user account at a time
- System activity can be accurately tracked by user
- Each employee can configure their own profile and email signature

This helps maintain proper accountability and organization within the system.

User Profile Settings

?? ADMINISTRATOR SETUP GUIDE

Each user in DynaTrail Dispatch has their own **User Profile** where they can configure personal settings and preferences.

These settings allow users to customize how emails are sent and how information is displayed within the system.

User profile settings include:

- Personal contact email overrides
- Custom email signature
- Optional screen column visibility

These settings apply only to the **individual user account** and do not affect other users in the system.

IN THIS GUIDE

? Opening Your User Profile

?? Contact Email Overrides

?? Email Signature

? Optional Column Display Settings

? Dispatch and Board Display Options

? Saving Your Profile Changes

Opening Your User Profile

To access your profile settings:

1. Click the **User Profile** icon in the left navigation menu
2. The **My Profile** page will open

From here, you can configure your personal communication settings and display preferences.

Contact Email Overrides

The profile includes three optional email fields:

Invoice Email

This email address will be used when **sending invoices** from the system.

If this field is left blank, the system will use the **default invoice email configured in Company Profile settings**.

Carrier Confirmation Email

This email address will be used when **sending carrier confirmations**.

If left blank, the system will use the **default carrier confirmation email configured at the company level**.

Reports Email

This email address will be used when **sending reports generated from the system**.

If this field is not filled in, the system will use the **default reports email configured by the company**.

? Tip

These fields allow individual users to override company defaults if they prefer communications to be sent from their personal dispatch email.

Email Signature

Each user can configure their own **email signature**.

This signature will automatically be included when sending communications such as:

- Carrier confirmations
- Customer communications
- System-generated emails

The signature editor supports standard formatting such as:

- Text formatting
- Links
- Images
- Company logos

Many companies include information such as:

- User name
- Job title
- Company name
- Phone number
- Company contact information

This ensures that all outbound communication includes consistent professional contact details.

Optional Column Display Settings

Users can also configure which columns appear on certain system screens.

These settings allow users to customize the information visible in dispatch boards and other operational views.

Examples include optional columns for:

- Purchase Order numbers
- Delivery PO numbers
- Carrier information
- Equipment type
- PARS/PAPS information

- Trip documents

Each section allows users to **toggle columns on or off** depending on their workflow preferences.

These display settings apply only to the **current user** and will not affect other users.

Dispatch and Board Display Options

The profile also includes optional column settings for several system areas, including:

- **Daily Work Log**
- **Carrier Dispatch Boards**
- **Billing Board**
- **Tracing Screen**
- **Highway Dispatch Boards**

Users can enable or disable columns within each section to tailor their workspace.

This helps ensure each user sees the information most relevant to their role.

Saving Your Profile Changes

After making any updates to your profile settings:

1. Review the changes carefully
2. Click **Update User Profile**

Your changes will take effect immediately.